

TEACHERS' RETIREMENT BOARD
BENEFITS AND SERVICES COMMITTEE

SUBJECT: LEVEL OF SERVICE STANDARDS

ITEM NUMBER: 9

ATTACHMENT: 0

ACTION: _____

DATE OF MEETING: May 3, 2001

INFORMATION: X

PRESENTER(S): Michael Carter

EXECUTIVE SUMMARY

The Level of Service report provides the Benefits and Services Committee with the necessary information to fulfill its oversight responsibility regarding the delivery of benefits and services to CalSTRS members. The following reports for the month of March 2001.

I. Overview

- A. Fiscal Year Allowance Roll: CalSTRS paid a total of 168,498 benefit recipients \$306,255,331 in March 2001. The average monthly allowance roll for FY 2000/01 is \$303,844,227. Total disbursements for FY 2000/01 are \$2,734,598,040.
- B. Service Levels: All benefit programs delivered services within acceptable variance levels. Staff were unable to finalize a significant number of Service Retirement Benefits within the four-month objective due to the unavailability of data during START ramp-up. Staffs' ability to answer phone calls were primarily impacted in March by START related training.
- C. Application Volume: An overall increase of two percent in comparison to the same period last fiscal year. Staff continue to project that the overall volume will be slightly higher than the previous year.
- D. Interest Payments: No interest penalties were paid in March 2001 due to the inability to process these payments on an automated basis during START downtime.

II. Individual Program Reports: Pages 1-7

III. Miscellaneous Items: Pages 8 - 9

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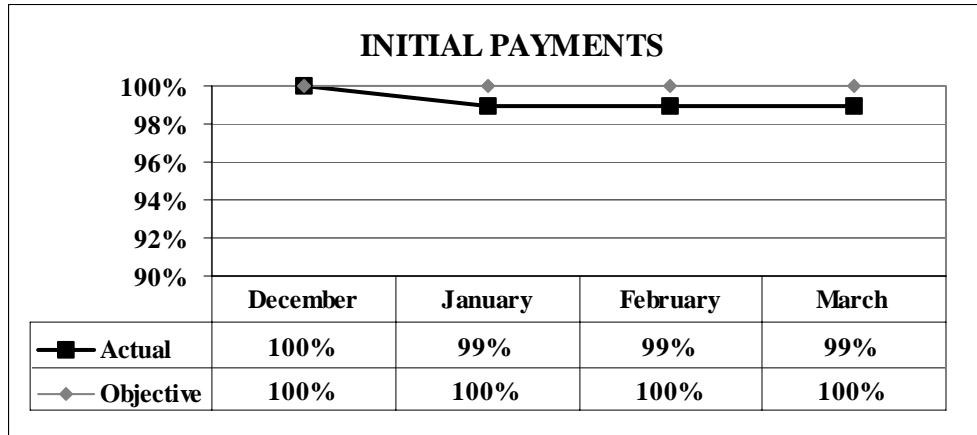
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Service Retirements

Objective Process 100 percent of all service retirement application payments within 30 days of the retirement effective date or receipt of completed application, whichever is later.

Application Volume Change Plus 8 percent in comparison to same period last fiscal year.

Baseline FY 1998/99 actual: 99 percent



Year to Date Average: 100%

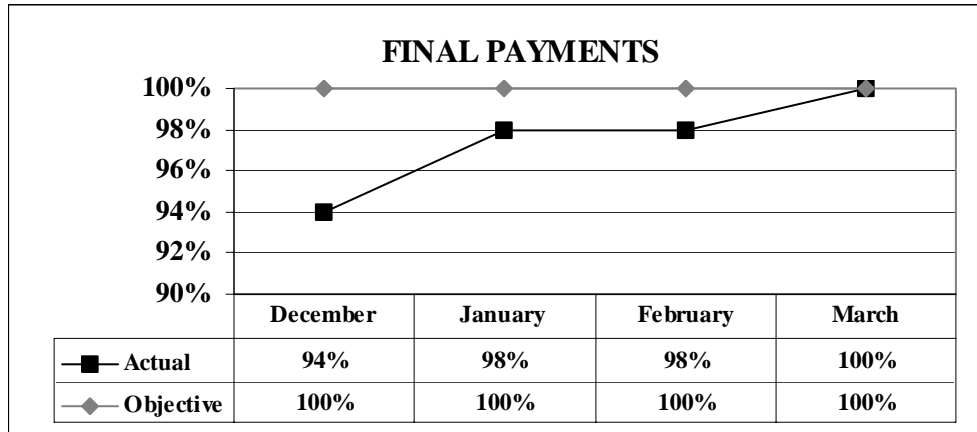
Objective Process 100 percent of all final service retirement payments within 45 days of receipt of all necessary information.

Interest Payments March 2001: START Downtime/No interest penalties paid

Current Year Cumulative:
270 payments/\$2,142
Current Year Monthly Average:
34 payments/\$268

Prior Year Monthly Average:
32 payments/\$176

Baseline FY 1998/99 actual: 98 percent



Year to Date Average 98%

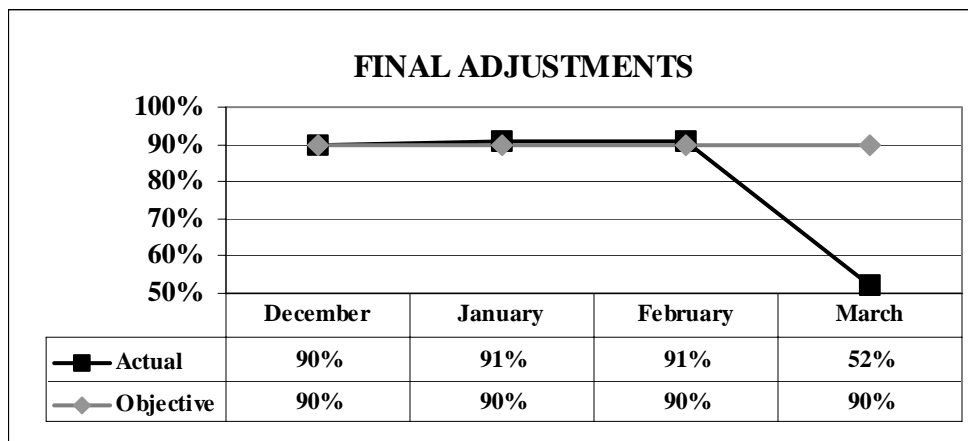
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Service Retirements

Objective Finalize 90 percent of all payments within four months of the retirement effective date.



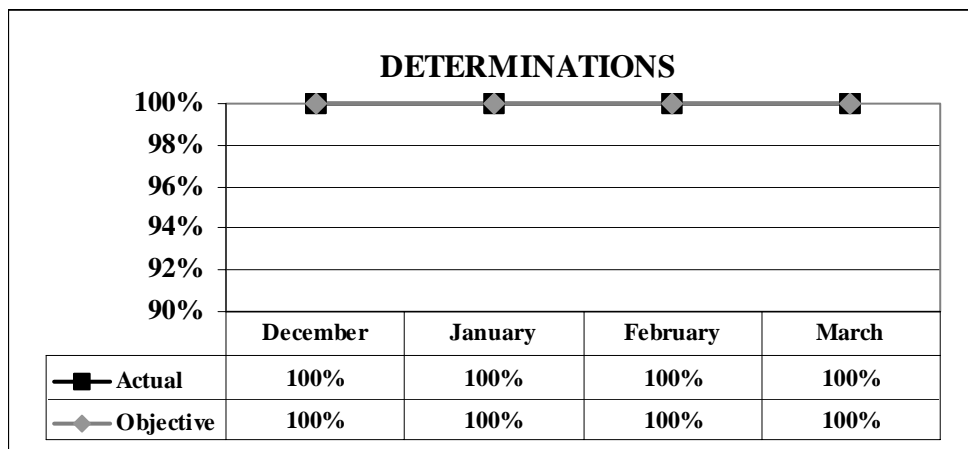
Baseline FY 1998/99 actual: 91 percent

Year to Date Average: 87%

Disability

Objective Process 100 percent of all eligible applications within 180 days of receipt.

Application Volume Change Minus 6 percent in comparison to same period last fiscal year.



Baseline FY 1998/99 actual: 99 percent

Year to Date Average: 100%

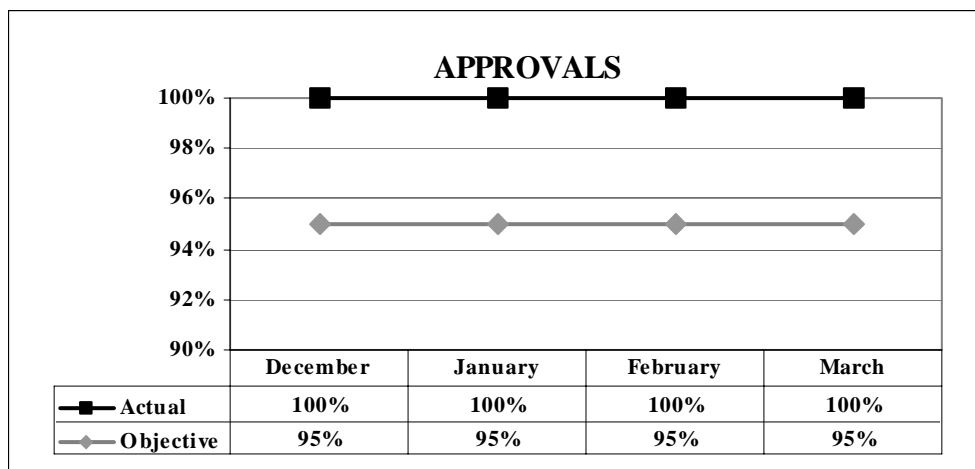
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Disability

Objective Process 95 percent of all approvals within 30 days of receipt of all necessary information.



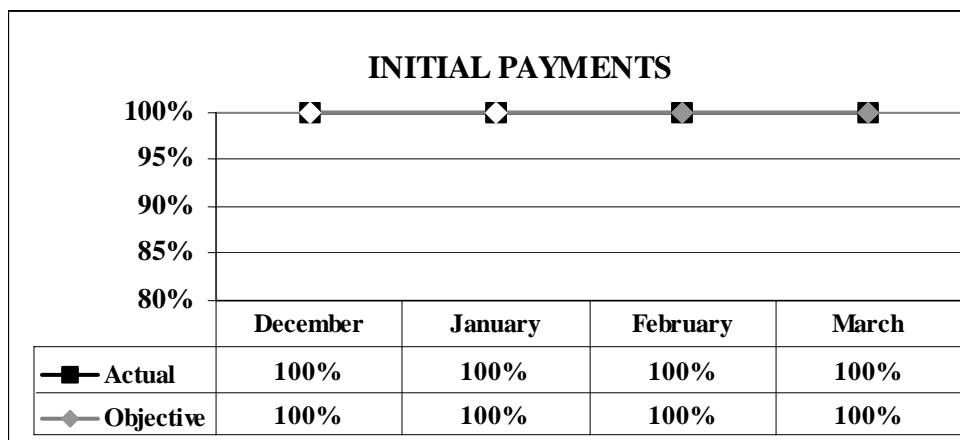
Baseline FY 1998/99 actual: 100 percent

Year to Date Average: 100%

Objective Process 100 percent of all initial payments within ten working days following the latter of the disability approval date, disability effective date or receipt of all necessary information.

Interest Payments March 2001: None

Current Year Cumulative:
None
Current Year Monthly Average:
None
Prior Year Monthly Average:
None



Baseline FY 1998/99 actual: 100 percent

Year to Date Average: 100%

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Survivor Benefits

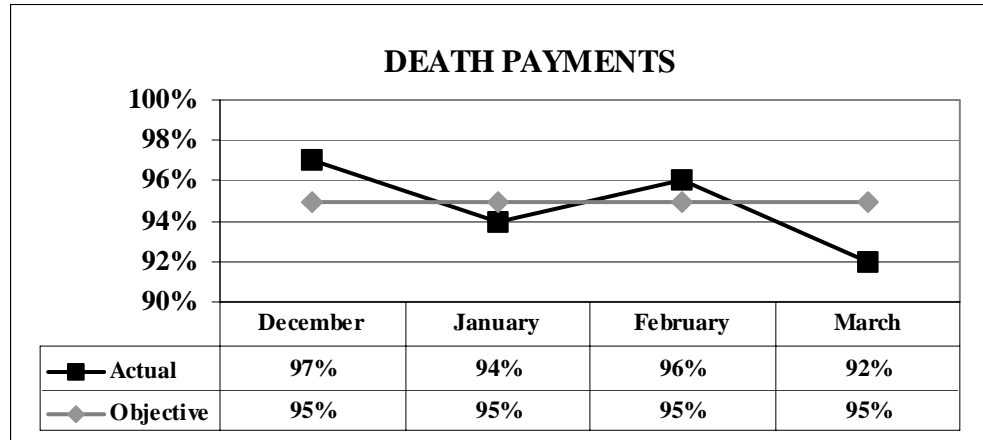
Objective Process 95 percent of all applications within 30 days of receipt of all necessary information.

Application Volume Change A 3 percent decrease in comparison to same period last fiscal year.

Interest Payments March 2001: START Downtime/ No interest penalties paid

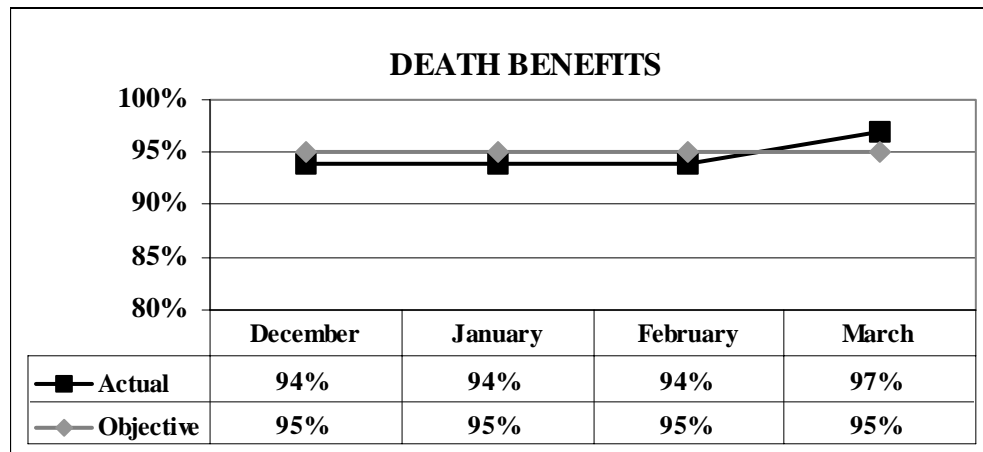
Current Year Cumulative:
177 payments/\$5,487
Current Year Monthly Average:
22 payments/\$686
Prior Year Monthly Average:
16 payments/\$1,309

Baseline FY 1998/99 actual: 97 percent



Year to Date Average: 96%

Objective Complete 95 percent of all payments for retired members within 90 days of receipt of notification of death.



Baseline FY 1998/99 actual: 93 percent

Year to Date Average: 96%

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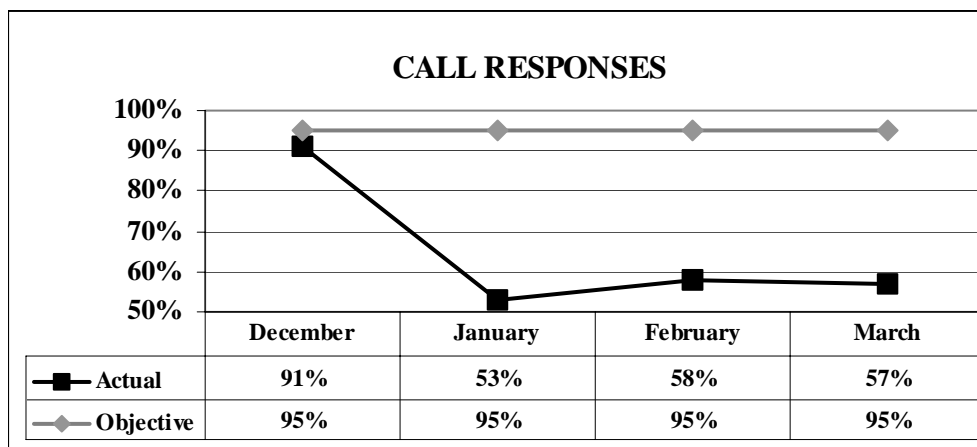
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Public Service

Objective Answer 95 percent of all calls in less than three minutes.

Volume Change 2.88 percent increase.

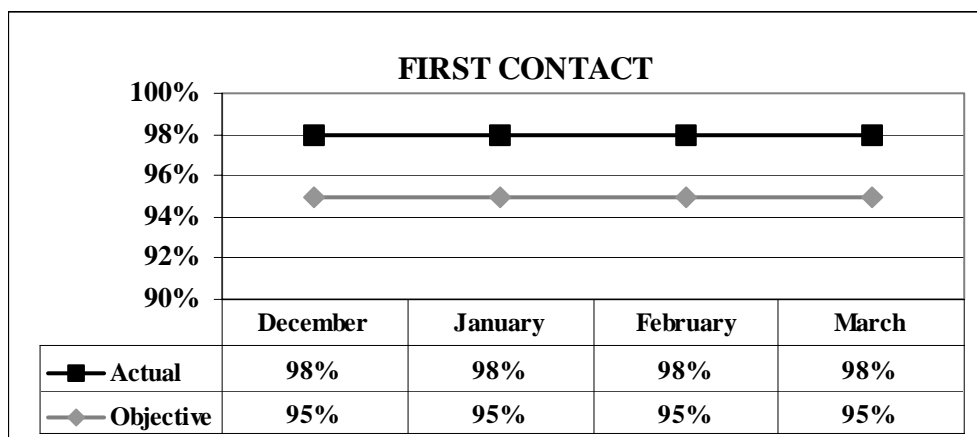
Notes Average queue time: 177 seconds
Longest queue wait: 25 minutes



Baseline FY 1998/99 actual: 94 percent
FY 1996/97 Objective:
75 percent in less than three minutes.

Year to Date Average: 78%

Objective Answer 95 percent of all calls on the first contact.



Baseline FY 1998/99 actual: 98 percent

Year to Date Average: 98%

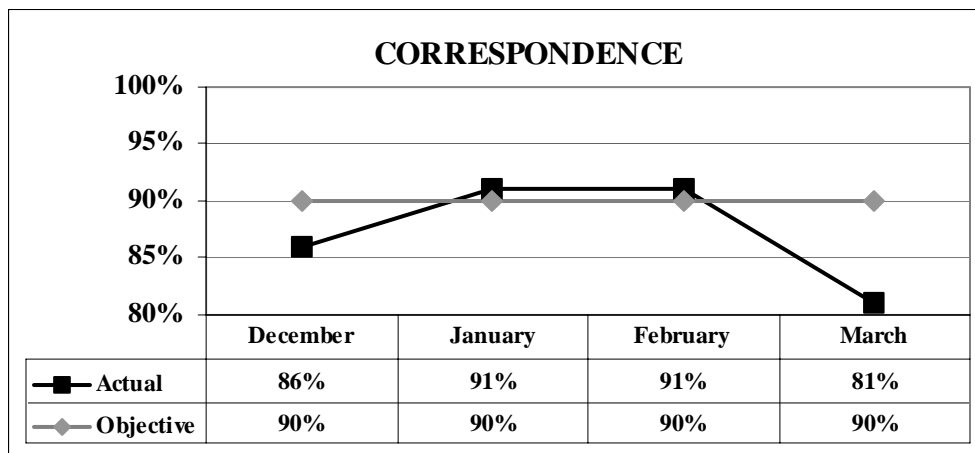
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Public Service

Objective Respond to 90 percent of all correspondence in ten working days.

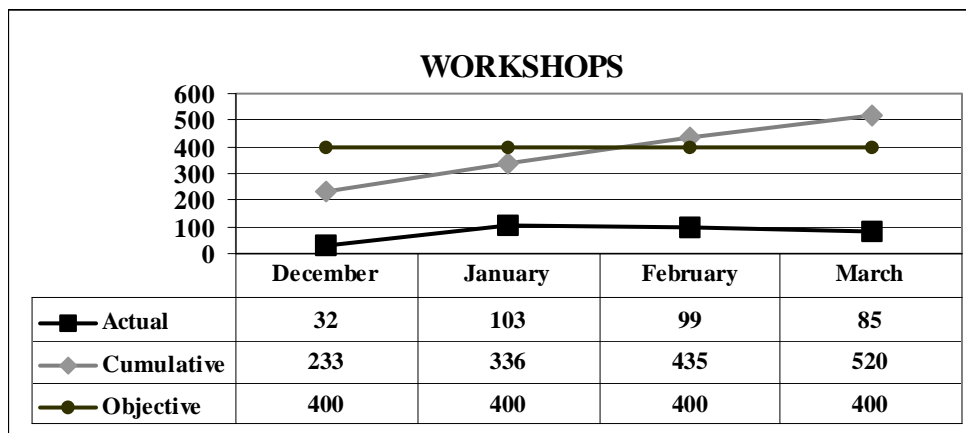


Baseline FY 1998/99 actual: 94 percent

Year to Date Average: 90%

Regional Counseling Services

Objective Conduct 400 workshops



Baseline FY 1998/99 actual: 491

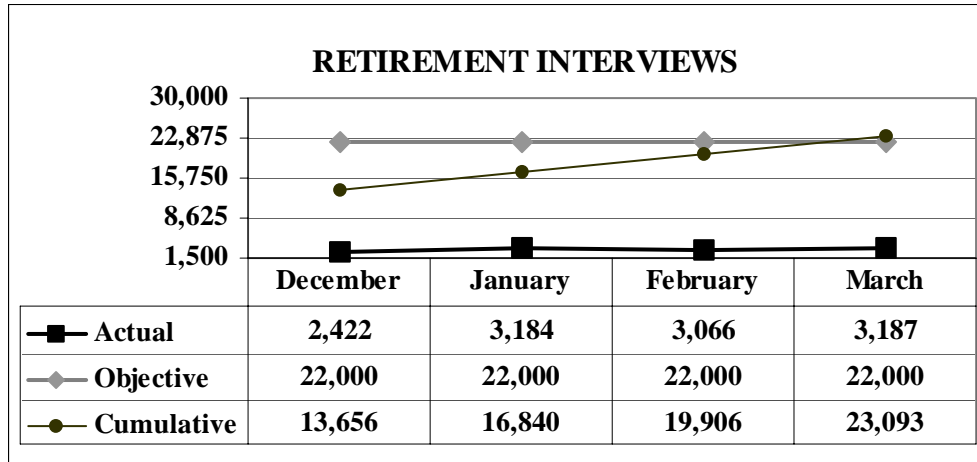
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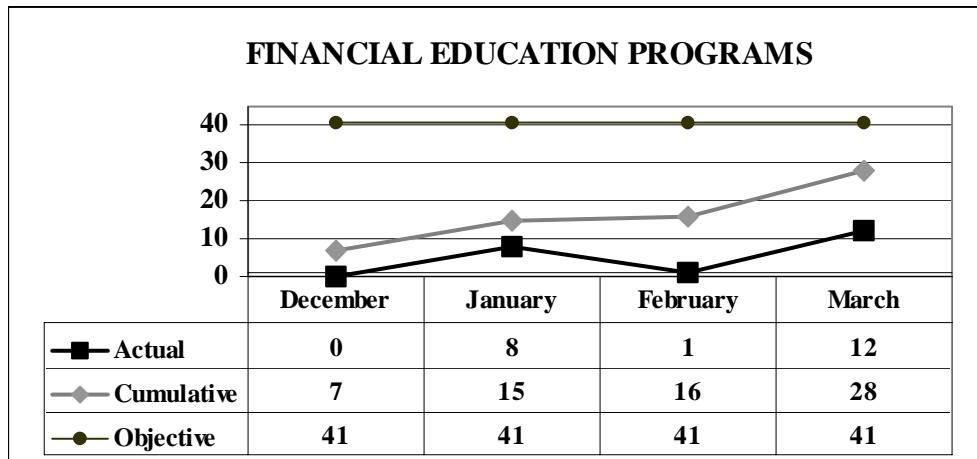
Regional Counseling Services

Objective Provide 22,000 retirement interviews.



Baseline FY 1998/99 actual: 24,657

Objective Deliver 41 Financial Education Program to CalSTRS members.



Baseline FY 1998/99 actual: 32

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III. Miscellaneous

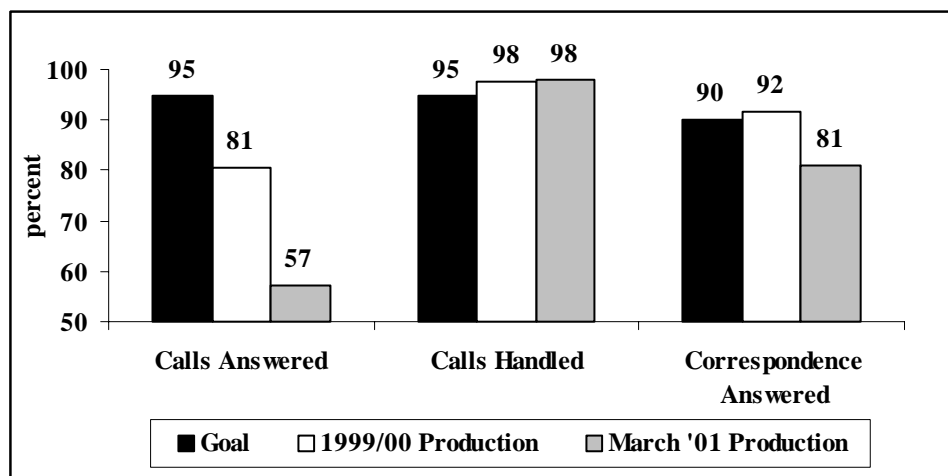
A. Outstanding Survivor Benefit Cases: The Education Code requires a report to the Board on outstanding Survivor Benefit cases not paid within six months of the notification of death. As of March there were 72 exceeding this threshold. In February 2001, there were 62 cases beyond the six-month processing period, while in January 2001, there were 69 cases exceeding the six-month threshold.

B. One-Year Final Compensation: During the current fiscal year, two school districts have chosen to participate in this program.

C. Golden Handshake:

July - March 2000 88 districts / 129 participants
July - March 2001 29 districts / 159 participants

D. Telephone Center:



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D. Telephone Center: (continued)

